VIRTUAL VISIT POLICY

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Purpose

This policy provides guidelines for implementing and managing Virtual Visits for hospitalized patients. The intent is to ensure patient safety and a positive patient experience while facilitating timely communication between patients, members of the care team, and non-clinical visitors for quality patient care.

Scope

This policy applies to bedside staff, virtual observers, members of the care team, and visitors who engage in Virtual Visits facilitated by Collette Health's observation system.

Procedure

1. Determining Patient Suitability

The patient's nurse or their designee is responsible for assessing whether a patient is suitable for Virtual Visits, based on the patient's capacity to participate in a Virtual Visit and the suitability of the Virtual Visit format for the intended purpose/objectives of the visit.

- The patient's nurse may designate a nursing colleague or nurse leader to make this assessment provided they have necessary knowledge of the patient's needs and condition.

- Prior to initiating a Virtual Visit, the patient's nurse or designee will inform and educate the patient regarding the Virtual Visit details, verify their comfort with the plan, and coordinate the Virtual Visit with the virtual observer and the virtual visitor.

2. Responsibilities

Patient's Nurse or Designee:

- Assesses patient suitability for Virtual Visits.

- Informs and educates the patient regarding the Virtual Visit plan and verifies his/her comfort with the Virtual Visit.

- Collects contact information (name, role, and email/phone number) for third-party virtual visitor.

- Informs third-party virtual visitor that they need to contact the virtual observer prior to ending the Virtual Visit so the observer can resume patient observation. The virtual visitor may contact the virtual observer by continually waving their hand in front of the camera until a response is received.

- Requests initiation of Virtual Visit by the virtual observer. Each organization should develop a workflow for the communication between the patient's nurse or designee and the virtual observer to initiate a Virtual Visit link.

- Intervenes if alerted by the patient, virtual observer or third-party virtual visitor that the objective of the Virtual Visit becomes unattainable, including termination of the Virtual Visit if appropriate.

Virtual Observer:

- Generates secure links for third-party Virtual Visits per the direction of the patient's nurse or designee.

- Maintains video observation during the Virtual Visit and watches for notification from the third-party virtual visitor that the Virtual Visit will end.

- During the Virtual Visit, the virtual observer may interrupt the Virtual Visit if the patient is engaging in behaviors that may cause injury or is showing signs of distress.

- Virtual observer will notify the patient's nurse immediately if patient appears in distress or at risk for injury, including sounding the alarm if appropriate.

Third-Party Clinical Virtual Visitor (member of the care team):

- Joins Virtual Visit using secure link sent by the virtual observer. The third-party clinical virtual visitor will be placed in the lobby until the virtual observer admits them to the Virtual Visit.

- Establishes the goals of the Virtual Visit with the patient.

- Responsible for monitoring patient safety during clinical Virtual Visit, requesting intervention from the virtual observer as needed, including contacting the patient's nurse and/or sounding the alarm to mobilize staff on the unit to the patient's aid as needed.

- Prior to ending the Virtual Visit, the third-party clinical virtual visitor informs the virtual observer that the call will end so he/she can resume audio and video-supported patient observation activities.

- If assistance from the virtual observer is needed, the third-party virtual visitor will get the attention of the observer by continually waving their hand in front of the camera until the virtual observer responds.

Non-Clinical Virtual Visits (patient family, friends, and support network)

- Joins Virtual Visit using the secure link sent by the virtual observer.

- Will alert the virtual observer prior to ending the visit or if the patient requires any assistance for safety or comfort.

- If assistance from the virtual observer is needed, the third-party virtual visitor will get the attention of the observer by continually waving their hand in front of the camera until the virtual observer responds.

Patient

- May request assistance from the virtual observer at any time during the Virtual Visit with the third party (either clinical or non-clinical visitor) by continually waving their hand in front of the camera until the virtual observer responds.

- May request the Virtual Visit to end by notifying the third-party virtual visitor, the virtual observer, or their nurse.

3. Operational Guidelines

Prioritization:

- Clinical visits are prioritized ahead of Virtual Visits with non-clinical visitors (patients' family, friends, or members of their support network) to ensure the prompt provision of patient care.

Link Generation:

- Secure links are issued by the virtual observer. The virtual visitor may join a session using the secure link once. If they subsequently attempt to enter a session again using the same link, they will receive a message noting the link has expired and will need to contact the patient's nurse to request a new link.
- Links will expire immediately after the virtual session has ended.
- Links that have not been utilized expire 12 hours after issuance to maintain security.
- Links that have not been utilized can be manually expired by the virtual observer.
- Only one link is active at a time so unused links must be manually terminated before the virtual observer can create and send a new link.

Device Requirements:

- Virtual visitors can join a Virtual Visit via a mobile device or computer using the secure link sent by the virtual observer to a valid email or phone number.
- Virtual visitors are encouraged to use Wi-Fi to establish a Virtual Visit connection to avoid data charges to their mobile device.

Security and Compliance:

- Virtual Visit software complies with HIPAA to protect patient privacy.
- Audio/video recordings are prohibited by any Virtual Visit participant, except for snapshots approved by the hospital. This is a feature only available to organizations that decide to opt in to use.
- The virtual observer may document the date/time, duration, and people participating in Virtual Visits using the notes feature if this information is part of their documentation workflow.
- The patient's nurse is responsible for complying with patient-specific security activities including protecting the identity of patients admitted under "confidential" status. Such security designations may impact the use of Virtual Visits.
- 'Privacy mode' and 'out of room' features are disabled during Virtual Visits to ensure the virtual observer maintains continuous visibility with the patient and the virtual visitor.

4. Call Management and Access Control

Consent:

- The patient's nurse or designee must approve all Virtual Visits, inform and educate the patient regarding the Virtual Visit in advance, and validate that any patient concerns have been addressed.

- The patient's nurse or designee is responsible for coordinating the visit with the third-party virtual visitor and for sharing the virtual visitor's contact information with the virtual observer so he/she can generate the secure virtual link and share it with the virtual visitor.

- The virtual observer will manage the creation and manual expiration of all generated links at the direction of the patient's nurse or designee, as needed. Only one link may be active at a time and, therefore, unused links may need to be manually expired to create a new link.

Virtual Observer Call Management Responsibilities:

- The virtual observer creates the secure link and sends it to the approved virtual visitor using the contact information supplied by the patient's nurse or designee.

- Virtual observers will prioritize patient safety during all Virtual Visits and, as such, will notify the patient's nurse or designee immediately if a safety concern requiring an immediate response is identified.

- If a connectivity issue disrupts a Virtual Visit, the virtual observer may create and send a new link for the third party to rejoin once they have re-established a stable connection.

- If an issue arises regarding the prioritization of multiple Virtual Visit requests, the virtual observer will prioritize a clinical visit over a non-clinical visit. Concerns or objections from the patient regarding prioritization of Virtual Visits will be directed to the patient's nurse or designee for resolution.

- If the virtual observer receives feedback from the patient that they have questions or concerns following a Virtual Visit, the virtual observer will inform the patient's nurse during their next contact.

5. Implementation and Evaluation

- When implementing the Virtual Visit program, it is recommended that, initially, only members of the clinical team participate in Virtual Visits until all team members gain comfort with the new workflow. **The specific roles within the care team that may utilize Virtual Visits for the planning, provision, and coordination of patient care should be clearly defined.**

- The decision to expand Virtual Visits to non-clinical visitors, including patients' family, friends, and support network should be made **with support of the executive champion for the virtual care program**, and with consideration of the impact on the patient and the care team.

- **Care should be taken to define persons and/or roles that should be excluded from participating in Virtual Visits**, and for this information to be shared with the nursing and virtual observation staff.

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6. Additional Considerations

- Virtual Visits should align with hospital visitation policies for non-clinical visitors.

- If Virtual Visits are conducted during evening, night-time or defined quiet hours, the patient's nurse should take care to ensure that the Virtual Visit will not be disruptive to other patients. (i.e., close patient door, lower microphone and speaker volume, etc.)

- Observers are not responsible for monitoring Virtual Visit content but should maintain visual contact to observe for safety concerns.

- If an organization decides to utilize Virtual Visits in a scheduled manner, with multiple visits occurring sequentially for a single patient, then the organization must develop a procedure and a responsible party to manage the scheduling process.